Approving Accounts, Assigning Tasks and CLRS for Other Provider Users

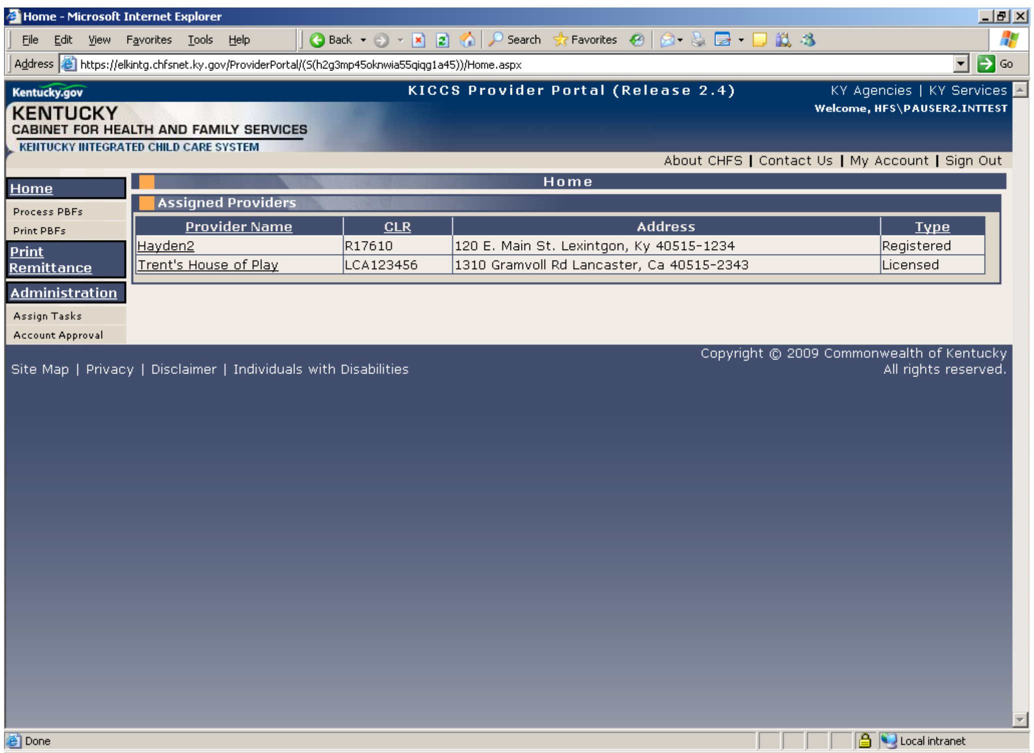
You are considered a "**Provider User**" by the KICCS Provider Portal system if you are able to access the program, but you do **not** have sufficient privileges to assign tasks or CLR#s to other users. (See Example 1)

You are considered a "**Provider Admin**" by the KICCS Provider Portal system if you meet one of the following criteria:

- You only have one (1) child care facility (or home) but you want to allow other people access to your online PBFs. (See Example 2)
- You are the administrator over several child care facilities and need to set up specific individuals (such as Directors or Account Managers) for each of the facilities you administer. (See Example 3)

If you see the Administration link in the left menu on the KICCS Provider Portal Home page when you log in, you are a "**Provider Admin**":

Administration Link with Assign Tasks and Account Approval



Before you can begin assigning tasks and CLR#s to your staff or authorized users, both you and they must have an **approved account** (See the "Getting Access" Flowchart).

On the next few pages, we are going to walk you through a couple of examples. It may seem complicated, but it's really very easy!

Example 1:

Wilma Thompson provides care for her young granddaughter in her home. She was approved as a Registered Provider and has been mailing her monthly PBFs and receiving the reimbursement each month. She decided to sign up to use the Provider Portal to avoid the cost of mailing her PBFs and also because she would enjoy being able to view her payments online at her leisure. She doesn't want to give anyone else access to view her PBFs online. She is considered a "**Provider User".**

Steps to become a Provider User:

1. Wilma requests an Account using Patti.smithglover@ky.gov as the Administrator Email (See **Request An Account** on the Provider Portal News Site)

2. Wilma completes and faxes the necessary forms and documents (See **FORMS AND VERIFICATION NEEDED** on the Provider Portal News Site) to the DCC (Division of Child Care) Admin @ 502-564-3464. You may also scan the documents and email them to ATTN: Portal Admin at email address portal.access@ky.gov. Please type "New Request" in the subject line of your email. The third option is to mail the form and required verification to:

   ATTN: Provider Portal Admin
   Division of Child Care 275 East Main Street, 3C-F
   Frankfort, KY 40621

3. The DCC Admin will verify that all forms and Wilma's driver license has been received, and make the determination to approve or deny her request for an account.
4. When Wilma receives her approval notice and User Name via email, she's ready to get started on the Portal!

Example 2:

Rebekah Jameson provides care for her neighbor's small child in her home. She was approved as a Registered Provider and has been mailing her monthly PBFs and receiving the reimbursement each month. She has decided to sign up to use the Provider Portal to avoid the cost of mailing her PBFs and also because she would enjoy being able to view her payments online at her leisure. She would like for her husband to be able to assist her as a backup for the Provider Portal. Rebekah would be considered a "**Provider Admin**", and her husband would be considered a "**Provider User**"

Steps to become a Provider Admin and sign up another user as a Provider User:

1. Rebekah requests an Account using Patti.smithglover@ky.gov as the Administrator Email (See **Request An Account** on the Provider Portal News Site)
2. Rebekah completes and faxes the necessary forms and documents for both HERSELF and her HUSBAND (See **FORMS AND VERIFICATION NEEDED** on the Provider Portal News Site)
3. After Rebekah receives her approval notice and User Name via email, her husband requests an Account, using ***Rebekah's*** email address as the Administrator Email.
4. Rebekah will receive an email notifying her that her husband has requested an account.
5. Rebekah will log onto the Provider Portal, click on Outstanding Requests, and click on her husband's name link. Once on the Approval page, she will click Approve.
6. The DCC (Division of Child Care) Admin will receive an email notifying them that Rebekah has completed the first level of approval. The DCC Admin will then verify that Rebekah's husband has submitted all required forms and his driver's license, and will make the determination to approve or deny his request for an account.
7. Rebekah will receive another email notifying her that the second level of approval for her husband is complete. She will then log onto the portal and assigns ALL tasks to her husband (See the **Assign Tasks and CLR#s** section in this document).

8. Once Rebekah has added CLR#s and tasks, her husband can now access the Provider Portal.

Example 3:

Mary Johnson is the corporate administrator for Pins and Needles Diaper Daycare, a chain of 25 licensed and certified child care facilities scattered in various counties throughout the state of Kentucky. Each facility has its own CLR# established, and its own unique business name. Each facility is run by its own Director and back-up, or assistant Director. The Directors are responsible for some or all of the following duties:

- Documenting Daily Attendance
- Collecting copay amounts
- Completing Monthly PBFs (Provider Billing Forms) for CCAP (Child Care Assistant Program) recipients

Mary also employs one person who serves as Account and Billing Manager for all 25 sites. This person tracks all payments owed to each provider and documents payments received for each site.

Mary employs Sue Rogers as her Assistant Administrator. Sue performs all of Mary's duties in her absence, or as needed when Mary is overwhelmed.

Mary wants Sue to help her manage the Provider Portal accounts. Both Mary and Sue will be considered "Provider Admins". The Directors and Assistants of each center will be considered "Provider Users". The Account Billing Manager will also be considered a "Provider User".

Steps to become a Provider Admin and sign up other users as Provider Users:

1. Both Mary and Sue request an Account using Patti.smithglover@ky.gov as the Administrator Email (See **Request An Account** on the Provider Portal News Site). Mary completes and faxes the necessary forms and documents for both HERSELF and all of the Directors, Assistants, and Account Billing Manager (See **FORMS AND VERIFICATION NEEDED** on the Provider Portal News Site). Mary lists ALL 25 CLRs on her form.
2. Sue completes and faxes the necessary forms and documents. Sue lists ALL 25 CLRs on her form.
3. After Mary and Sue receive their approval notices and User Names via email, the Directors, Assistants and Account Billing Managers request an Account, using either Mary's or Sue's email address as the Administrator Email.
4. Mary or Sue will receive an email notifying her that someone has requested an account.
5. Mary or Sue will log onto the Provider Portal, click on Outstanding Requests, and click on that person's name link, or they may type in the Request Number provided in the notification email. Once on the Approval page, they will click Approve.
6. The DCC (Division of Child Care) Admin will receive an email notifying them that Mary or Sue has completed the first level of approval. The DCC Admin will then verify that the Director, Assistant or Account Billing Manager has submitted all required forms and driver's license, and will make the determination to approve or deny his request for an account.

7. Mary or Sue receives another email notifying her of the second level of approval. She will then log onto the portal and assign tasks to the person for whom the account was approved (See the **Assign Tasks and CLR#s** section in this document). She decides to give the Director ALL tasks. Because the Account Billing Manager is only responsible for maintaining the billing accounts, the only tasks assigned to her/him are View PBFs and Print Remittances.
8. Once Mary or Sue has added CLR#s and tasks, the Director, Assistant or Account Billing Manager can now access the Provider Portal.

Assigning Tasks and CLR numbers

The rest of this document is pertinent to the scenarios listed above in Examples 2 and 3.

Tip: To view or work with the PBFs (Provider Billing Forms) online, a user must have both Tasks assigned, and be associated with, or 'attached to', at least one (1) CLR#.

Tasks: Tasks are tied to the person. Any task assigned to you is applicable to all providers (CLRs) tied to you. For example, you could not set up your Account Billing Manager with View Only tasks for CLR21435, and then give ALL tasks for CLR29081. Tasks are per person, not CLR.

View PBFs- Individuals with this task may view PBFs online.

Print PBFs- Individuals with this task may print or view any PBF.

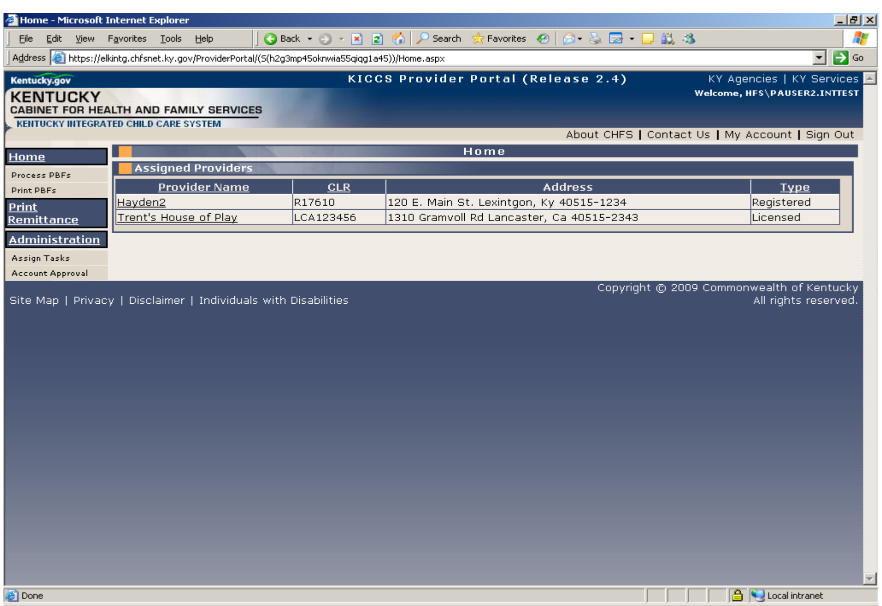
Save PBFs- Individuals with this task may View PBFs, enter exceptions, enter Provider Notes, and click SAVE. They cannot send the PBF to the CCAP for payment approval.

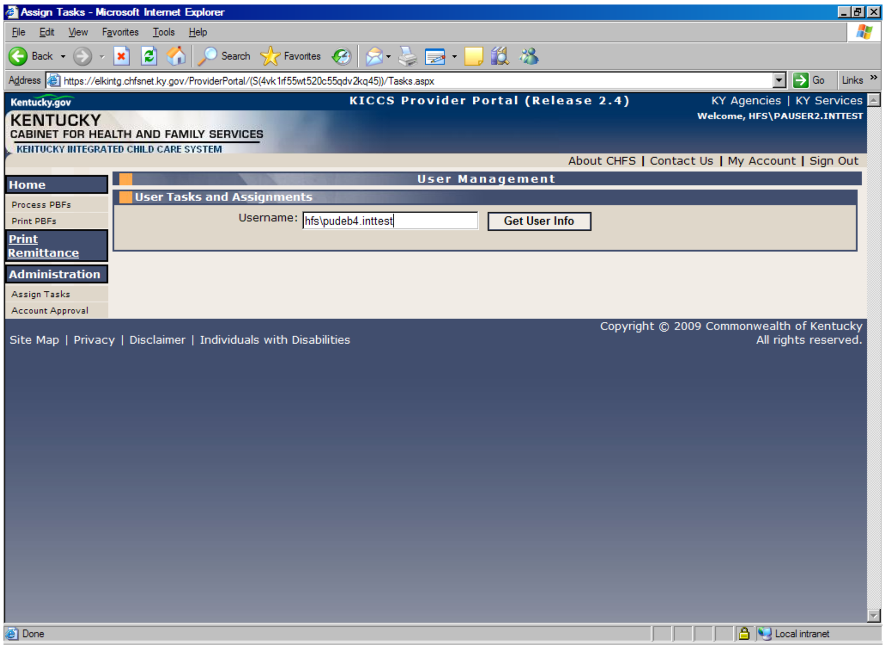
Process PBFs- Individuals with this task may View PBFs, enter exceptions, add provider notes, and send the PBF to the CCAP agency for payment approval.

Print Remittances- Individuals with this task may View and/or Print the payment remittance reports.

To assign tasks:

1. Log onto KICCS Provider Portal
2. Click on the Assign Tasks link, located underneath the Administration tab.



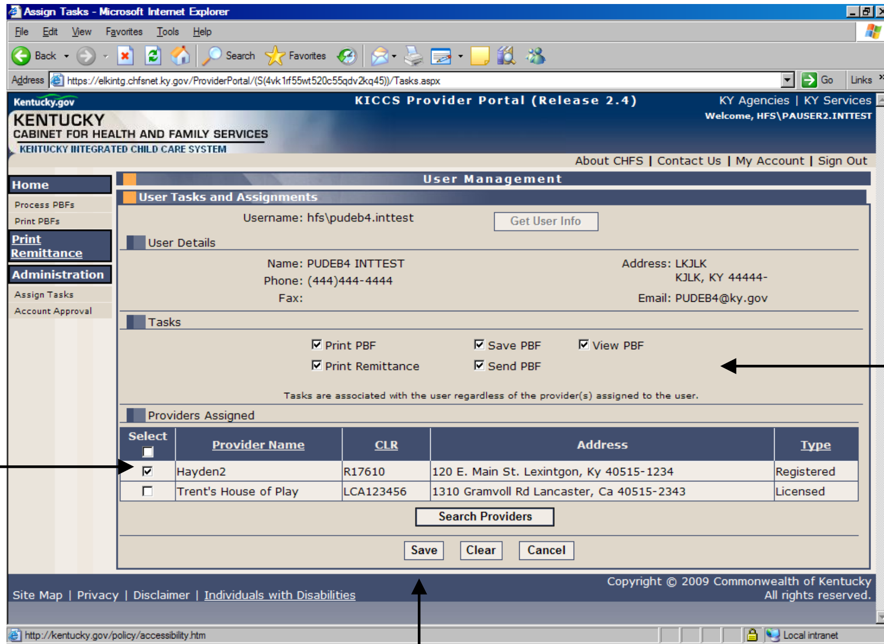


3. Type in the User Name of the individual for whom you are going to assign tasks. The format must be: AAA\AAAA.AAAA. (**You must use a back slash-not a forward slash!**). The User Name must match exactly or no results will be found. Once the User Name is typed in, click the **Get User Info button**.

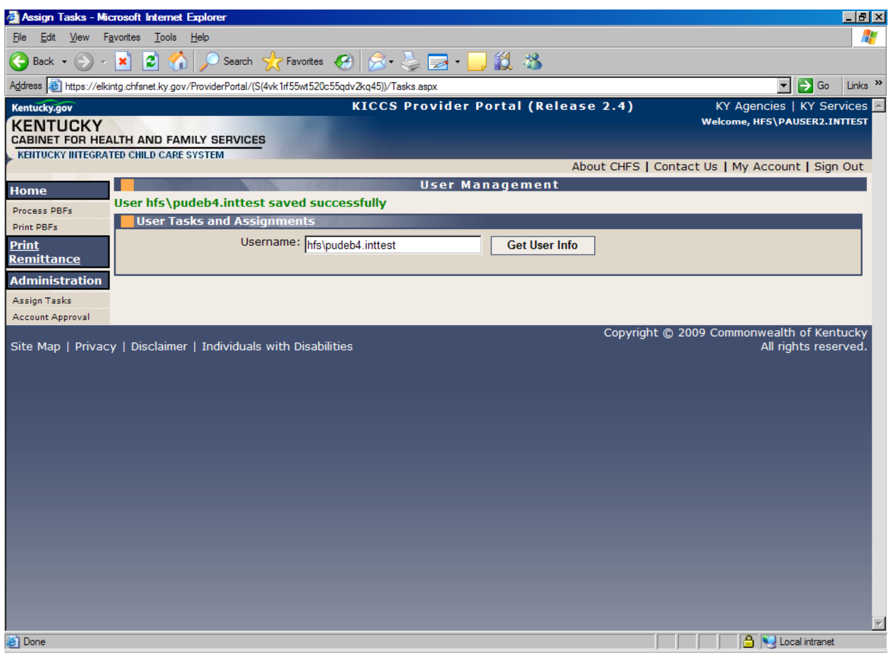
4. On the User Management page, select the CLR(s) (or Provider Name) that you want associated with the user you are setting up by clicking your mouse in the checkbox.

5. Select the Tasks you wish to give to the user by clicking your mouse to the left of the Task.

6. Once you've selected all tasks and CLRs, click the SAVE button.



7. You should receive a successful message:



8. Let the individual know they are now set up on the KICCS Provider Portal!

Tip: If you receive an error message or have any questions, contact the KICCS HelpDesk by calling 502-564-0104, Option 6, or by e-mail at CHFSKICCSHelpDesk@ky.gov